Electronic Access Conference
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2001

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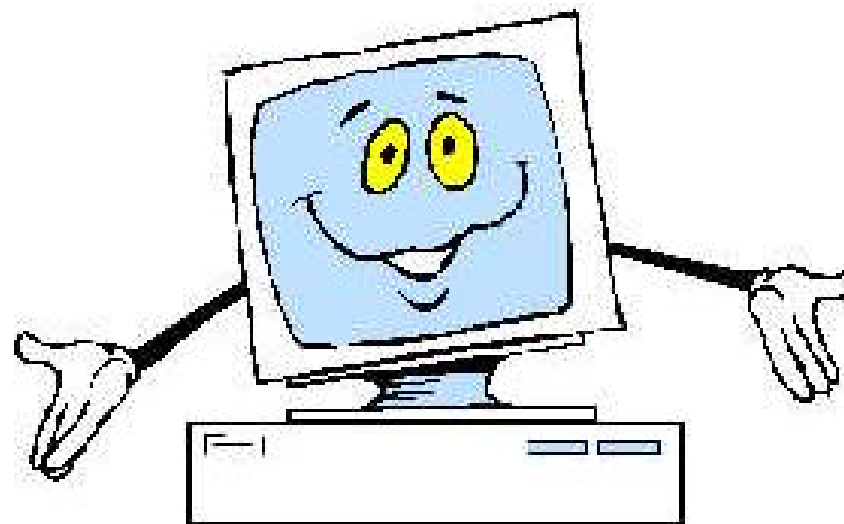
Electronic Access Conference
*e*magine 2001

SFA to the Internet: EDconnect Software

Introduction

- **Who is this session for?**
  - All levels

- **Evaluations**

- **Questions**
  - Time for Q & A at end of session

What will this session cover?

- Migration

- EDconnect 5.0.0

- On-line Secure Manager (OSM) System

- Questions

Migration

- EDconnect 4.1.0 users need to migrate

- Download and install Edconnect 5.0.0 (SFAdownload.ed.gov)

- Go to **SFAwebenroll.ed.gov**

- Select "SFA to the Internet Migration"

- Cover letter contains Migration checklist

Migration

- **Deadline for Migration is <u>12-18-2001</u>**

- Old files may be restored until deadline

- Files sent with previous versions of EDconnect will no longer be available after Migration deadline

- Caution: EDExpress will auto-export to the last open version of EDconnect

EDconnect 5.0.0
What do you need ?

- Software available online (SFAdownload.ed.gov)

- Download the Cover Letter, Desk Reference and Installation Guide

- Download the installation file (EdCon500.exe) and run it on each PC

- Network and local Install options

Network Installation

- **Caution**: EDconnect 5.0.0 database and previous versions of EDconnect have the same name, Edconn32.mdb.

- Do *not* install the EDconnect 5.0.0 database into a folder containing the database of an earlier version of EDconnect.

Installation Temp files

- During install process EDconnect 5.0.0 will create temporary installation files in the windows temp folder

- If these files already exist from a previous install you will be given the option to overwrite the old files

- It is best to overwrite previous install files in the windows temp folder and let EDConnect 5.0.0 create new current install files

Definitions and Terms

- ***Security Group*__**
  - Contains the destination point's TG Number
  - Contains the mailbox password that expires every 120 days
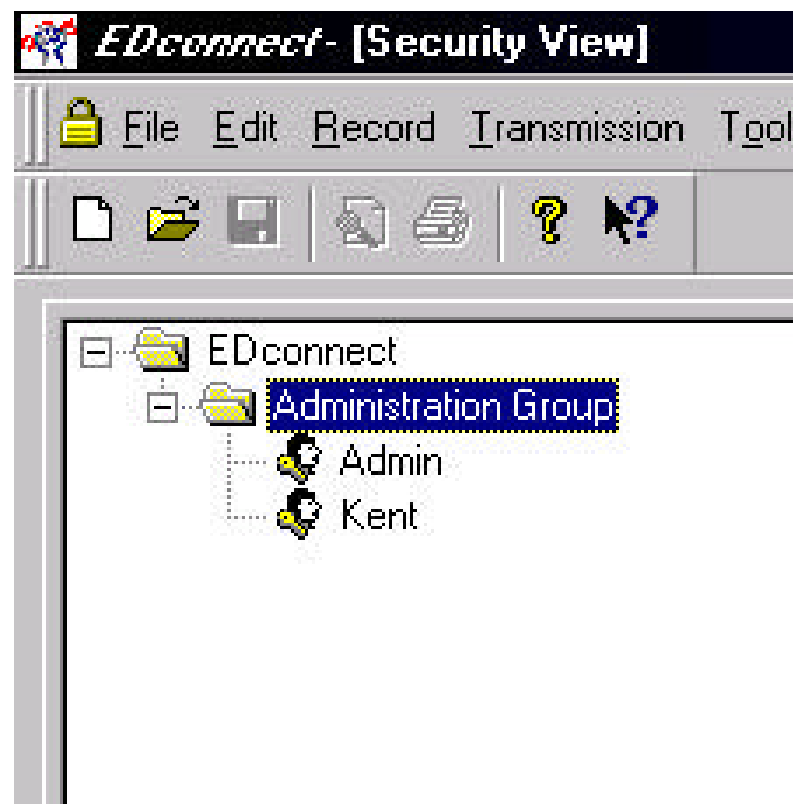
Definitions and Terms

- **_User ID_**
  - All individuals that transmit data with EDconnect must have their own login *User ID* and password
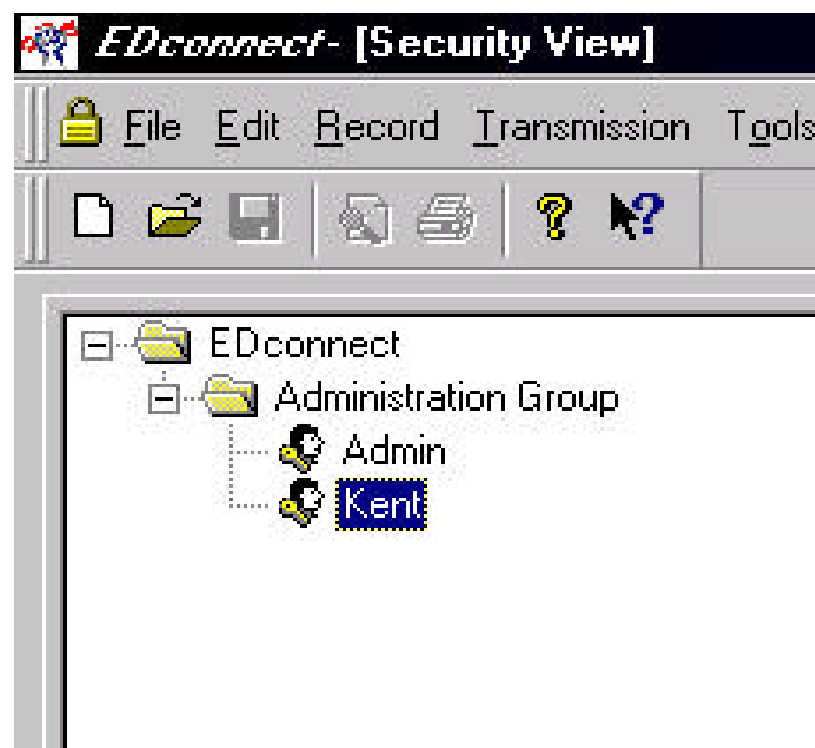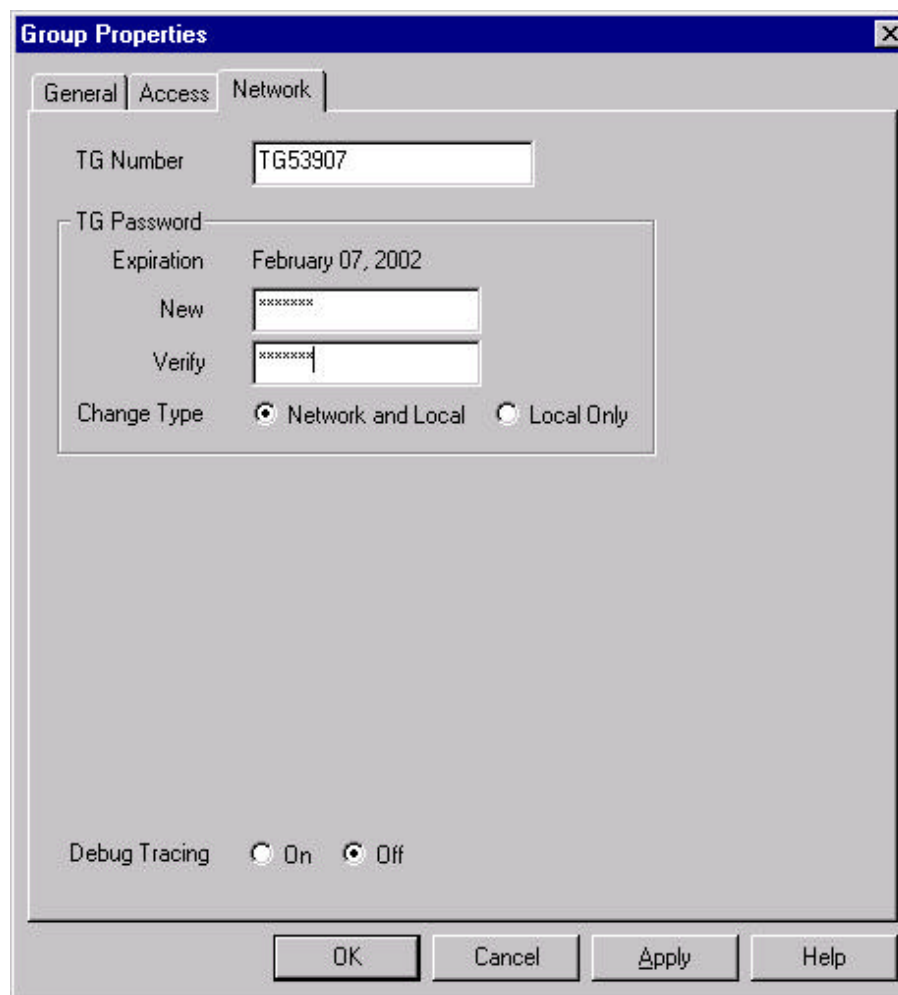
Security View - User

- *Directories* tab displays location of EDconnect database

- *Send* and *Receive* data directories default to C:\iam\data

- Data directories should match your EDExpress or other software setup

User Properties

Identity | General | **Directories** | Colors | Printing

Database

c:\program files\edconnect\   Browse...

Directory where the EDconnect database is located.

☐ Set all users of this group to the specified directories

OK   Cancel   Apply   Help
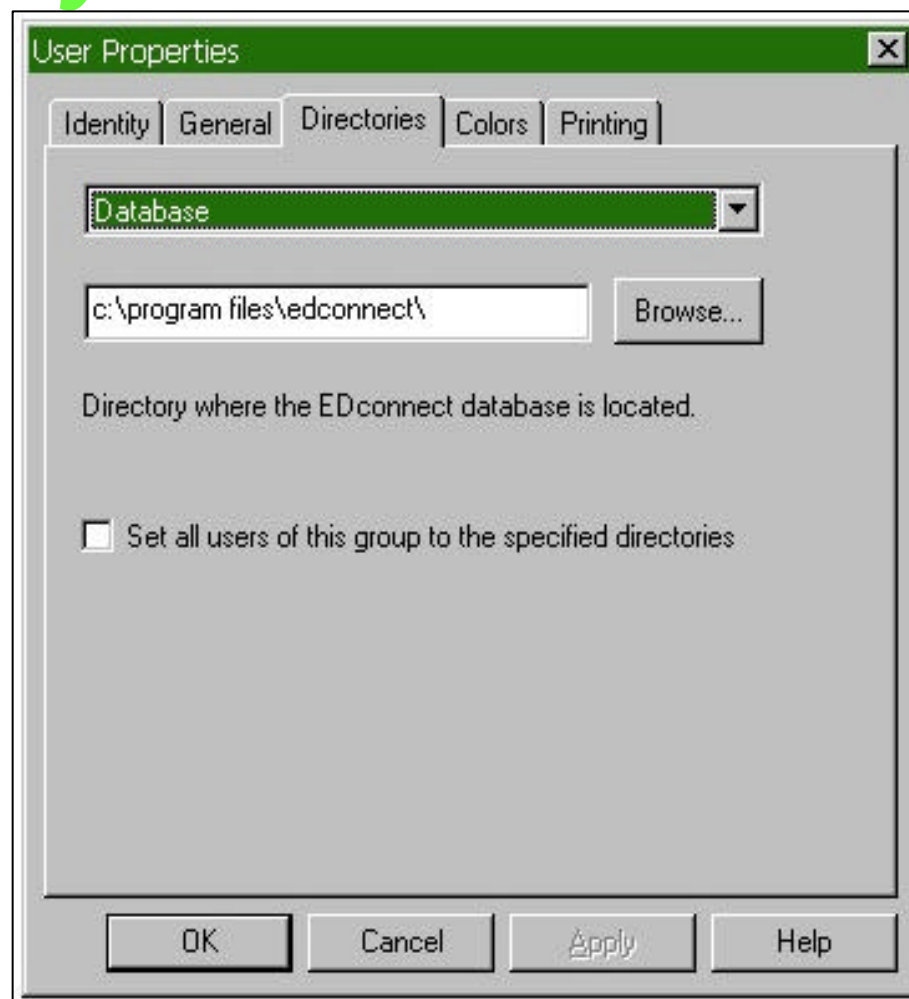
Security View - Group

- Network tab contains Network ID (TG number) and mailbox password

- Displays expiration date for mailbox password

Group Properties

General | Access | Network

TG Number   TG53907

TG Password
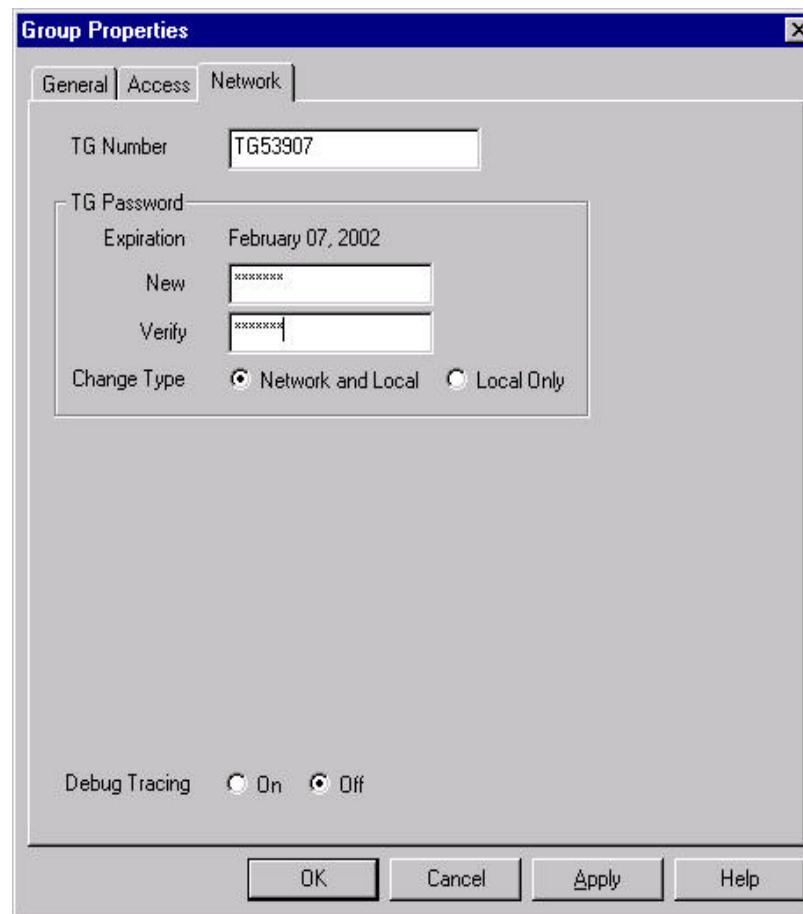
Expiration   February 07, 2002

New   xxxxxxx

Verify   xxxxxxx

Change Type   ● Network and Local   ○ Local Only

Debug Tracing   ○ On   ● Off

OK   Cancel   Apply   Help
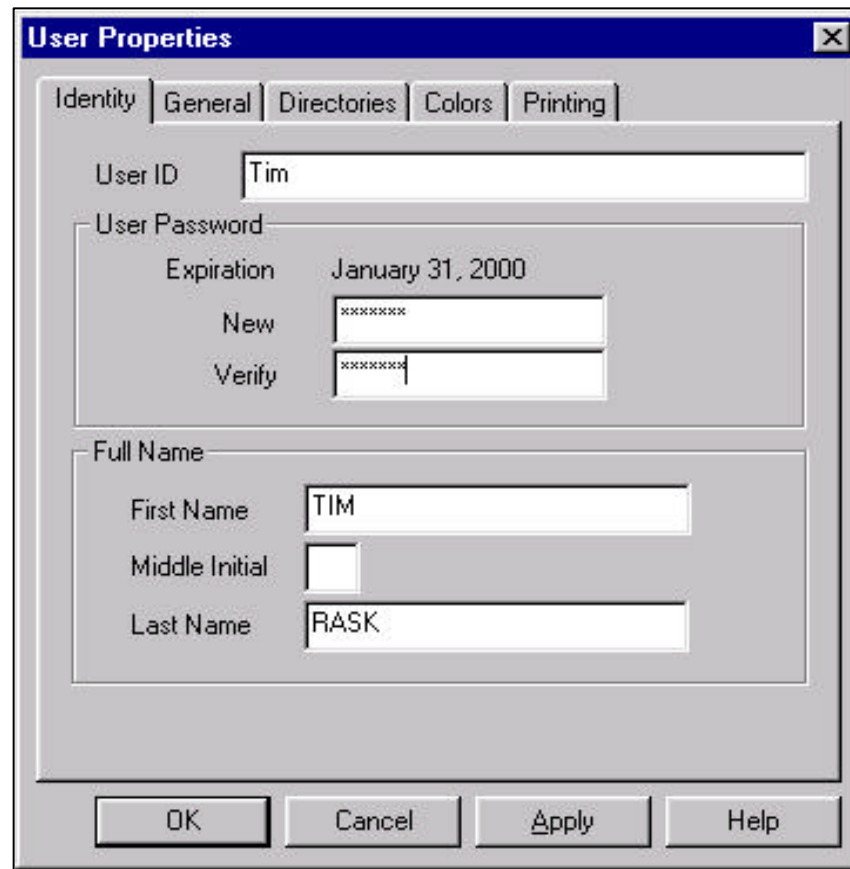
EDconnect & Password Changes

A warning that password has or will expire is received when entering EDconnect refers to the **_User_** login password

Changing the User Password
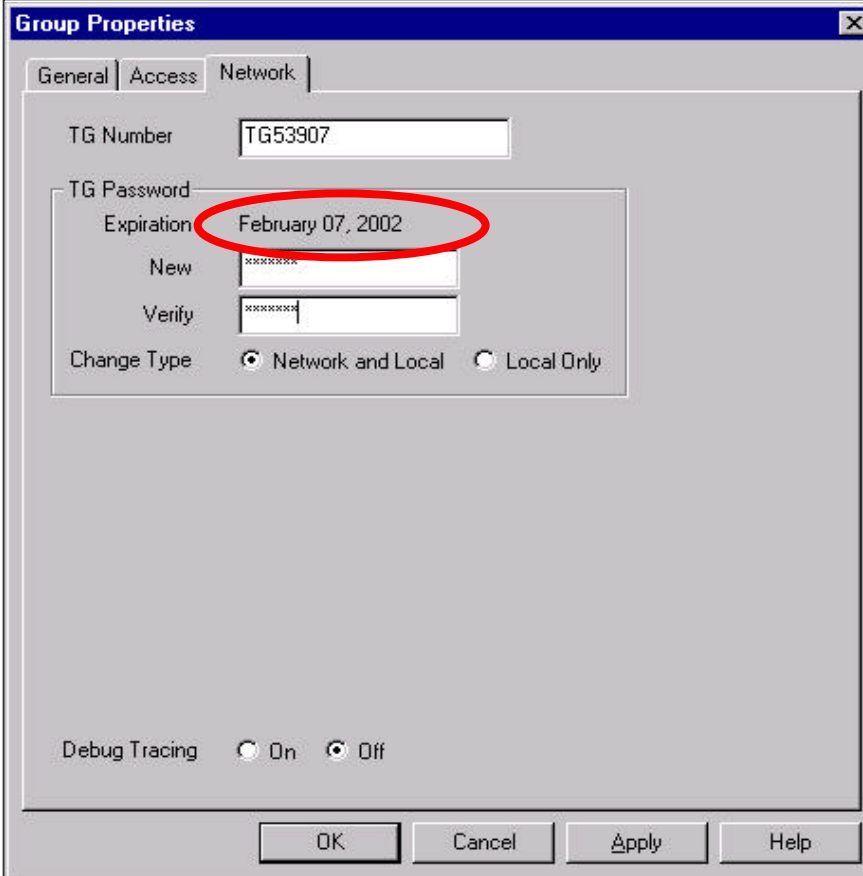
- Go to *Security View*, right-click on your *User ID*, and select *Properties*

- Type a new password in the new and verify fields

- Must be 7 or 8 characters Passwords are case-sensitive

Changing the Mailbox Password

- No warning message that Mailbox password is going to expire.

- Error message on transmission if Mailbox password expires

- Mailbox password expires every 120 days

Changing the Mailbox Password

- In *Security View*, right-click Group ID select *Properties* then *Network* tab

- Change type is "Network and Local"

- Enter a new password in the new & verify fields, 7 or 8 characters then click OK

- From *Transmission* menu select *Now*

EDconnect 5.0.0 Connection Setup

- **EDconnect 5.0.0 uses existing Internet connection to send and receive files**

- **Two ways to set up connections**
  - Direct Connection
  - Internet service provider (ISP) dial-up

Direct Connections
"Always On"

- **Examples of "always on" Connections**

  - LAN (Local Area Networks)
  - Cable modem
  - DSL modem

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"Connection To Use"

- We recommend all customers select "Direct Connection" in Connection to use
  - For Direct Connection and dial-up ISP
  - Dial-up ISP must first establish connection then open EDconnect to transmit files

Properties [×]

Connection | Toolbars | Commands

Connection to use   Direct Connection ▼   ⬅

Phone number preview   N/A

Test

OK   Cancel   Apply   Help
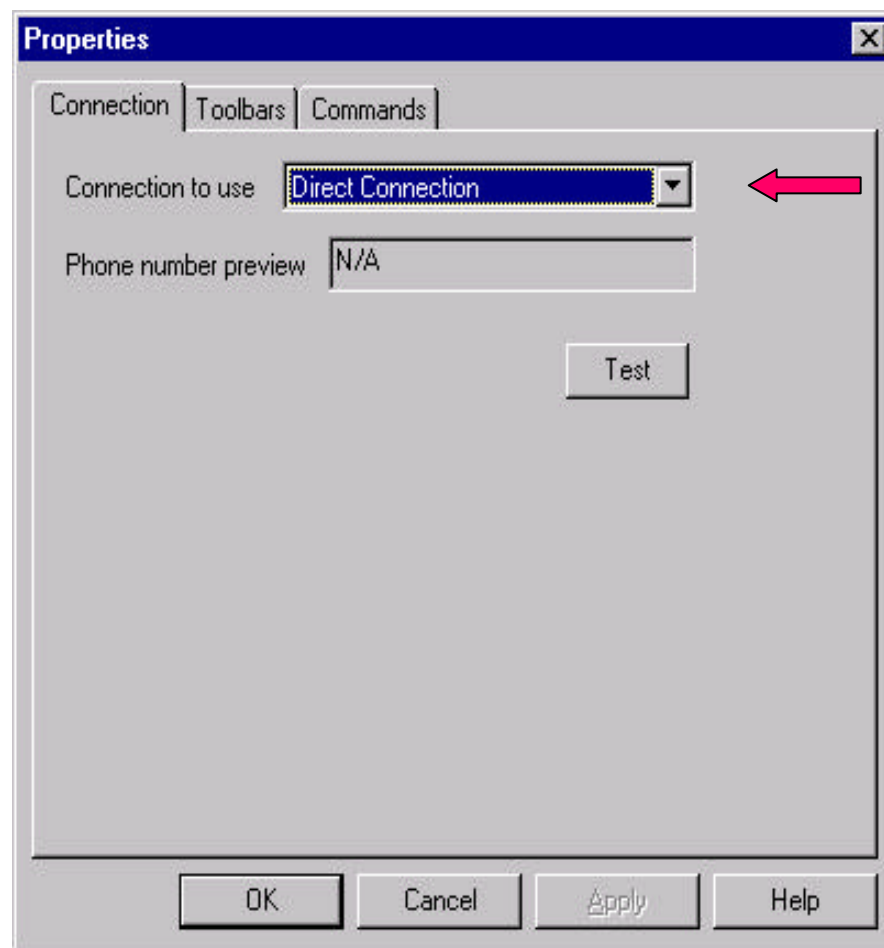
Firewalls
What You Need to Know

- A **_Firewall_** is a barrier between a computer and an external source such as the Internet
  - Can be hardware or software
  - May prevent EDconnect from communicating with SAIG
  - Customers should check with technical support staff regarding Firewalls

Firewalls
What You Need to Know

- If a firewall is present the technical staff will need to open **port 26581** to allow outbound TCP/IP traffic

- Software Firewalls may also prevent EDconnect 5.0.0 from communicating with SAIG

Data Transmissions

- EDconnect sends and receives data for all Title IV application systems

- Multiple requests and sends may be done with each transmission
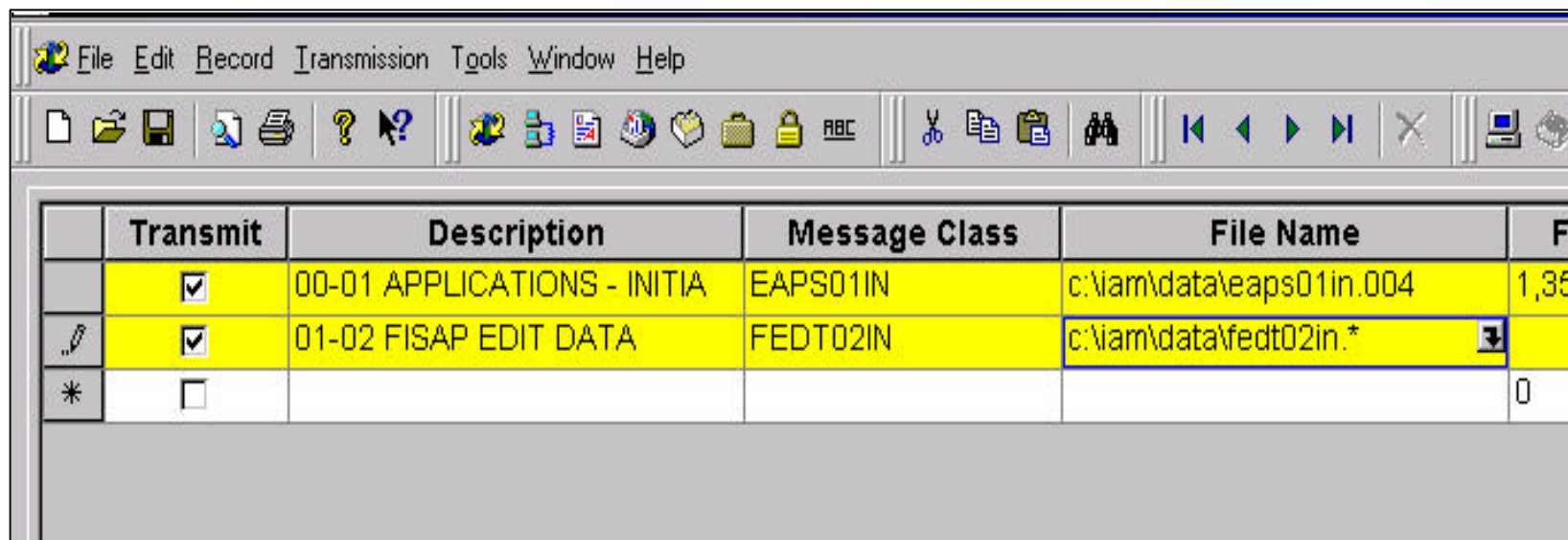
Transmission Queue

	Transmit	Activity	Project	Cycle	Description
	☑	Password			Password change
	☑	Send	CPS	00-01 Data	00-01 APPLICATIONS - INITIA
	☑	Request	Direct Loan	00-01 Data	00-01 ACK. - FULL SUMMAR
	☑	Request	RFMS	00-01 Data	00-01 PELL DISBURSEMENT
*	☐				

- **Access by clicking on**

- **Multiple items in TQ**

Sending from TQ
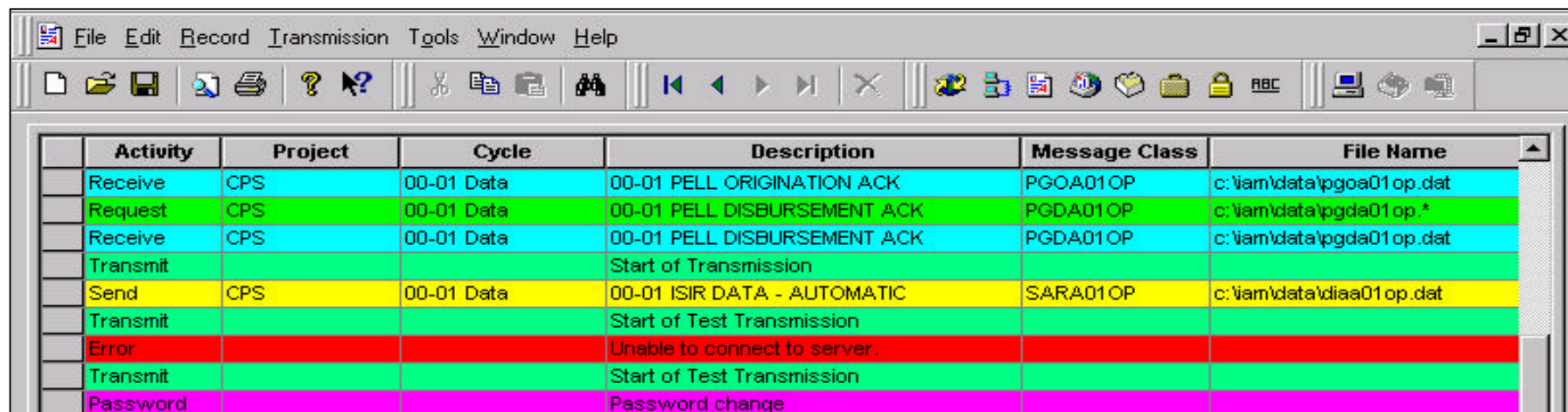
	Transmit	Description	Message Class	File Name	F
	☑	00-01 APPLICATIONS - INITIA	EAPS01IN	c:\iam\data\eaps01in.004	1,35
🖊	☑	01-02 FISAP EDIT DATA	FEDT02IN	c:\iam\data\fedt02in.*	
*	☐				0

- **Always include file name when sending**
- **An asterisk indicates TQ is not complete**

TQ—Sending a File
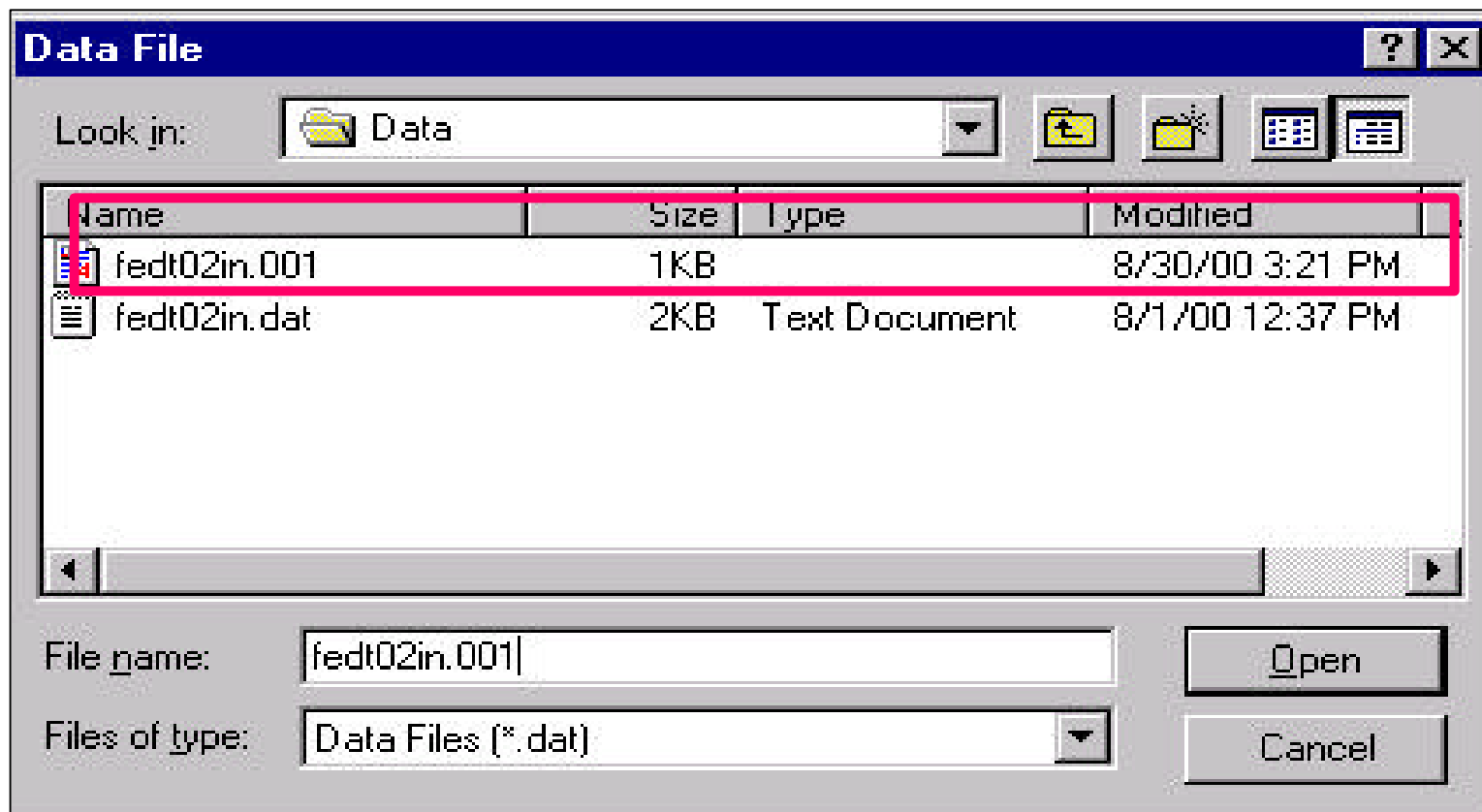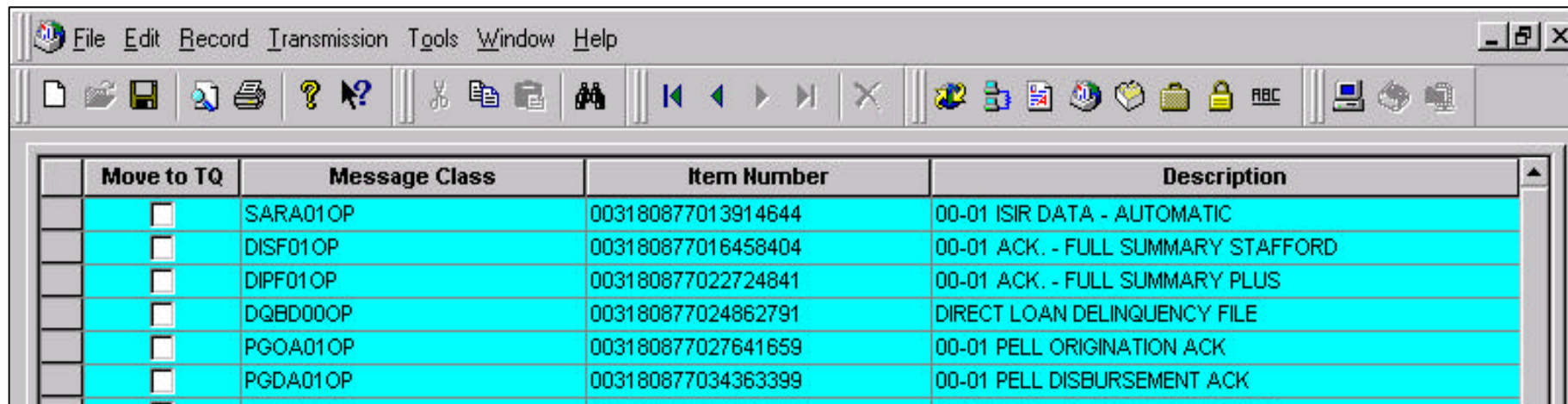
Activity Log

Activity	Project	Cycle	Description	Message Class	File Name
Receive	CPS	00-01 Data	00-01 PELL ORIGINATION ACK	PGOA01OP	c:\iam\data\pgoa01op.dat
Request	CPS	00-01 Data	00-01 PELL DISBURSEMENT ACK	PGDA01OP	c:\iam\data\pgda01op.*
Receive	CPS	00-01 Data	00-01 PELL DISBURSEMENT ACK	PGDA01OP	c:\iam\data\pgda01op.dat
Transmit			Start of Transmission		
Send	CPS	00-01 Data	00-01 ISIR DATA - AUTOMATIC	SARA01OP	c:\iam\data\diaa01op.dat
Transmit			Start of Test Transmission		
Error			Unable to connect to server.		
Transmit			Start of Test Transmission		
Password			Password change		

- **Maintains a detailed record of all data transmissions**

- **You may modify field positions and width of columns**

Mailbox Query

Move to TQ	Message Class	Item Number	Description
☐	SARA01OP	003180877013914644	00-01 ISIR DATA - AUTOMATIC
☐	DISF01OP	003180877016458404	00-01 ACK. - FULL SUMMARY STAFFORD
☐	DIPF01OP	003180877022724841	00-01 ACK. - FULL SUMMARY PLUS
☐	DQBD00OP	003180877024862791	DIRECT LOAN DELINQUENCY FILE
☐	PGOA01OP	003180877027641659	00-01 PELL ORIGINATION ACK
☐	PGDA01OP	003180877034363399	00-01 PELL DISBURSEMENT ACK

- Allows you to see what is currently available in your in mailbox

- Put check in "Move to TQ" column to download selected files

Archive View
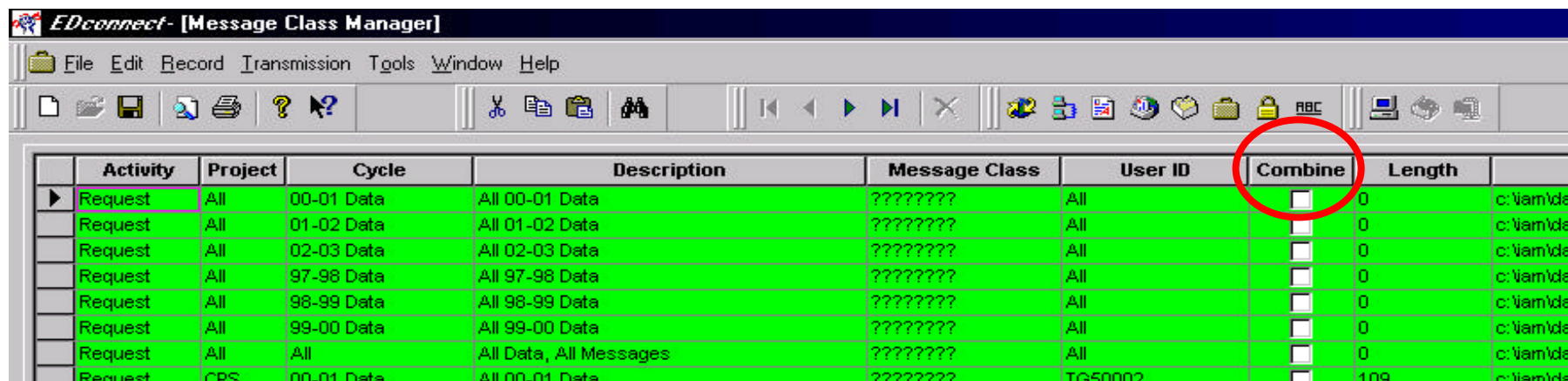
Move to TQ	Message Class	Item Number	Description	Add Date
☐	SARA01OP	003180158199631708	00-01 ISIR DATA - AUTOMATIC	10/10/200
☐	DIOC01OP	003180158202324760	00-01 ACK. - CHANGE ORIGINATION	10/10/200
☐	SARE01OP	003180158208197418	00-01 ERRORS-CORRECTIONS/DUPLICATES	10/10/200
☐	SSCRXXOP	003180158211286109	SSCR ROSTER	10/10/200
☐	DIPF01OP	003180158216975050	00-01 ACK. - FULL SUMMARY PLUS	10/10/200
☐	REAP02OP	003180158219747968	01-02 ISIR DATA-RENWAL APPS	10/10/200
☐	SARA01OP	003180248689439459	00-01 ISIR DATA - AUTOMATIC	10/11/200
☐	EAPS01OP	003180248695730313	00-01 ISIR DATA - ELECTRONIC APPS	10/11/200
☐	SARR01OP	003180248700300621	00-01 ISIR DATA-CORRECT/DUPLICATES	10/11/200

- **Allows you to retrieve "lost" files within ten days**

- **Use Item Number in Activity Log and Archive View**

Message Class Manager

Activity	Project	Cycle	Description	Message Class	User ID	Combine	Length	
Request	All	00-01 Data	All 00-01 Data	????????	All	☐	0	c:\iam\da
Request	All	01-02 Data	All 01-02 Data	????????	All	☐	0	c:\iam\da
Request	All	02-03 Data	All 02-03 Data	????????	All	☐	0	c:\iam\da
Request	All	97-98 Data	All 97-98 Data	????????	All	☐	0	c:\iam\da
Request	All	98-99 Data	All 98-99 Data	????????	All	☐	0	c:\iam\da
Request	All	99-00 Data	All 99-00 Data	????????	All	☐	0	c:\iam\da
Request	All	All	All Data, All Messages	????????	All	☐	0	c:\iam\da
Request	CPS	00-01 Data	All 00-01 Data	????????	TG50002	☐	109	c:\iam\da

EDconnect - [Message Class Manager]
File Edit Record Transmission Tools Window Help

- **Stores all electronic message classes available to SAIG users**

- *Combine* **allows downloading multiple files of the same message class to one large file**
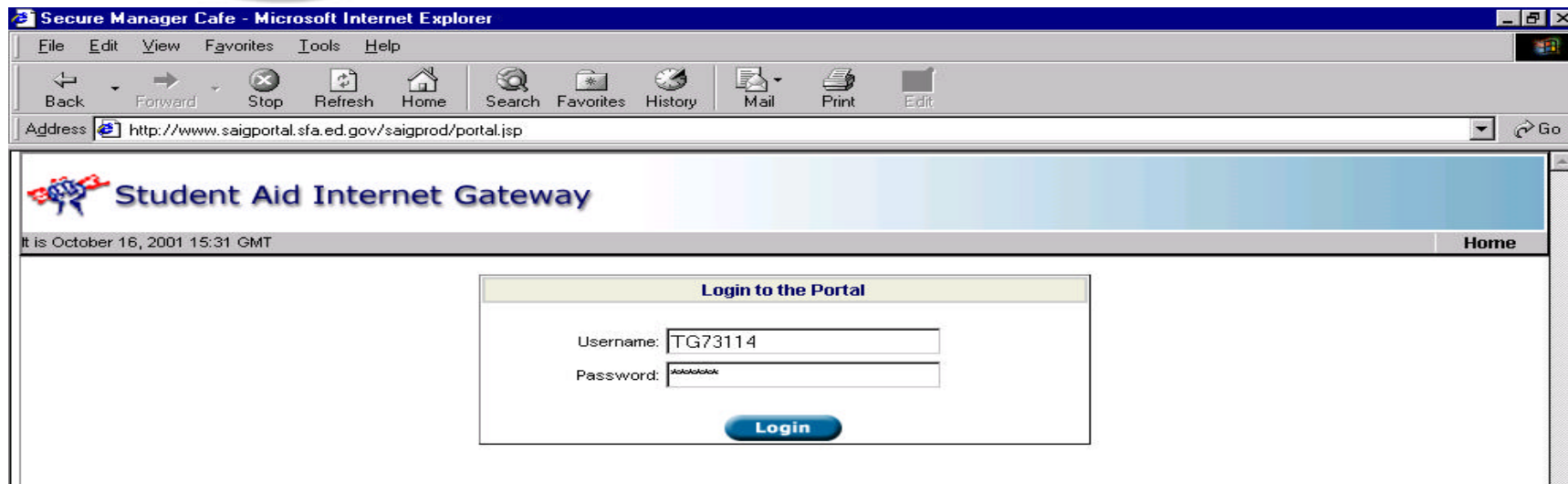
On-line Secure Manager (OSM) Overview

- Monitors sent and received files

- Provides filter and sort capabilities

- Supports advanced search options

- Can be used to restore files

- **URL = SAIGPortal.sfa.ed.gov**

Overview

- **All references to time are in Greenwich Mean Time (GMT) (six hours ahead of Central Time)**

- **Time is display in military time (18:00)**

- **Internet Explorer Version 5.0 displays the screens best; some versions of Netscape will not display full tabs**

Login

- **Username: enter TG Number, including "TG"**
- **Password: enter your Mailbox password**
- **Click Login**

Welcome Screen
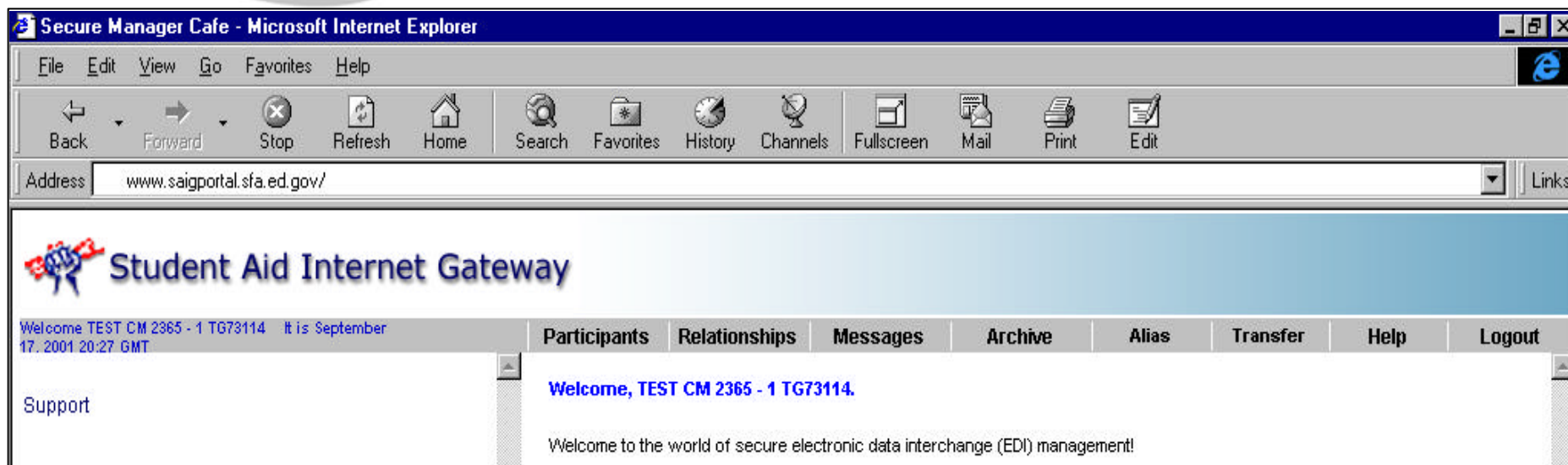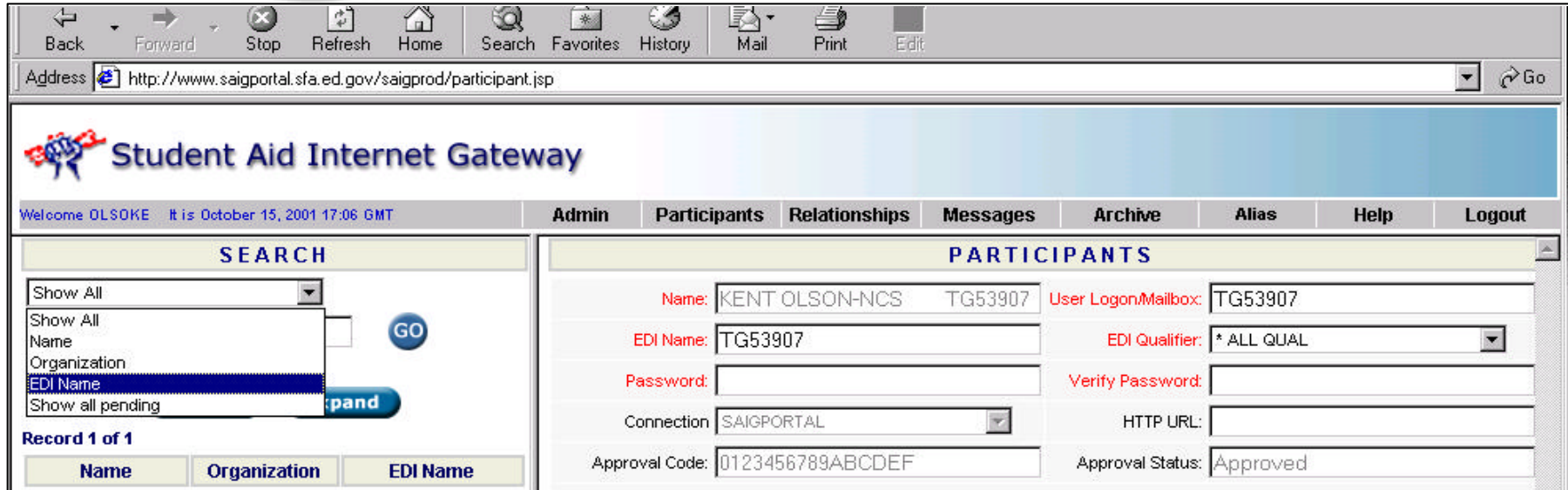
- You have access to the following tabs:
  - *Participants, Messages, Archive, Help, & Logout*
- Other tabs are disabled & reserved for CPS/WAN Technical Support

Participants Tab

- **Changing your Mailbox password**
  - Search for TG Number using "EDI Name"
  - Enter TG Number, click **Go**, then click on your school name in lower left
  - Enter new password in the "Password" and "Verify Password" fields
  - Click **Save** button to save password change
  - Then do a "Local Only" password change at each EDconnect workstation

Participants Tab

- On Participants Tab only make changes to "Password" & "Verify Password" fields

- Updating other fields may corrupt your school's setup in OSM & prevent the sending and receiving of data

Participants Tab

Messages Tab

- **Show All**—Displays all files in mailbox

- **To Mailbox**—Displays files to TG Number entered

- **From Mailbox**—Displays files from TG Number entered

- **Msg Class**—Displays only files of Message Class entered

- **Only New Messages**—Displays only receive type files that have not been received

Messages Tab

Expanded View

Restoring Current Files

- **Restore files within 10 days of receipt**
  - Go to **Messages** tab
  - Find **Receive File** to restore
  - Change status from "RECEIVED-USER" to "DLVD-TO-MAILBOX"
  - File will be available immediately

Restoring Current Files

Advanced Search

- **Method to filter the fields and create a specific search**

- **Fields which can be filtered include**

  - **Mailbox**
  - **Message Class**
  - **To Mailbox**
  - **Only New Messages**
  - **Batch # Range**
  - **From Mailbox**

  - **Received by Network**
  - **Placed in Mailbox**
  - **Retrieved from Mailbox**

Advanced Search For Messages

Archive Tab

- Files are moved to Archive ten days after **Date/Time Picked** up

- Same search capabilities as Messages tab

- Search **Archive** tab for file to be restored

- Mark file, click **Restore,** status = (pend)

- File is moved back to the **Messages** tab

- You may download files again within 24 hrs

Archived Messages

How did we do?

We appreciate your feedback and comments. We can be reached:

Phone:1-800-330-5947

Email: cpswan@ncs.com

Questions and Comments
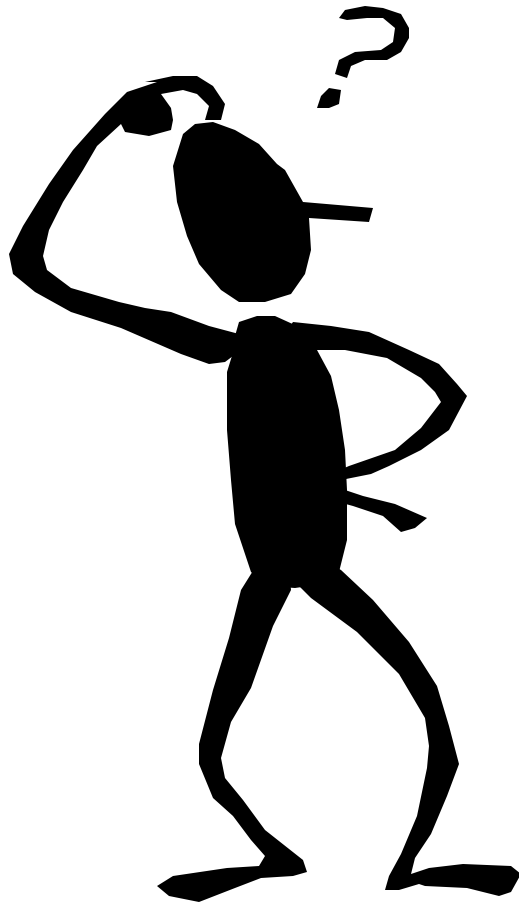
- **Mainframe Information Session 15 SFA to the Internet**

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